OSC TRAINING

PA313

Modifying Position/Employee Data and Reporting

TRAINING COURSE

State of North Carolina

Office of the State Controller

April 19, 2016

For assistance with any TRAINING needs, contact:

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Introduction

Overview

The course introduction is an opportunity to get to know others who are attending class as well as to agree on classroom courtesy. The instructor will inform you about the building facilities and when breaks will occur.

This class is an instructor-led course. It primarily covers two transactions, PO13 and PA30.

NOTE: PA is the acronym for Personnel Administration.

Pre-requisites

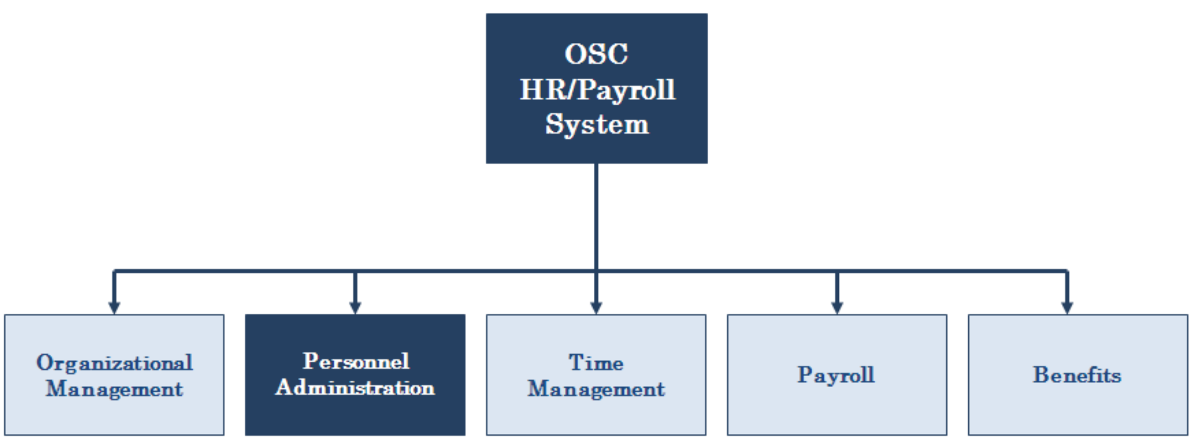
- PA210 - Personnel Administration Terms, Concepts, and Display Data
- PA310 - Create and Maintain Employee Data

There are two prerequisites that you must take before attending this course. Attending these prerequisites ensures that you are adequately prepared with the new processes, concepts and terms needed for successful completion of the *PA313 Maintain Position/Employee Data and Reporting c*ourse.

PA210 can be taken either virtually or through an instructor-led classroom.

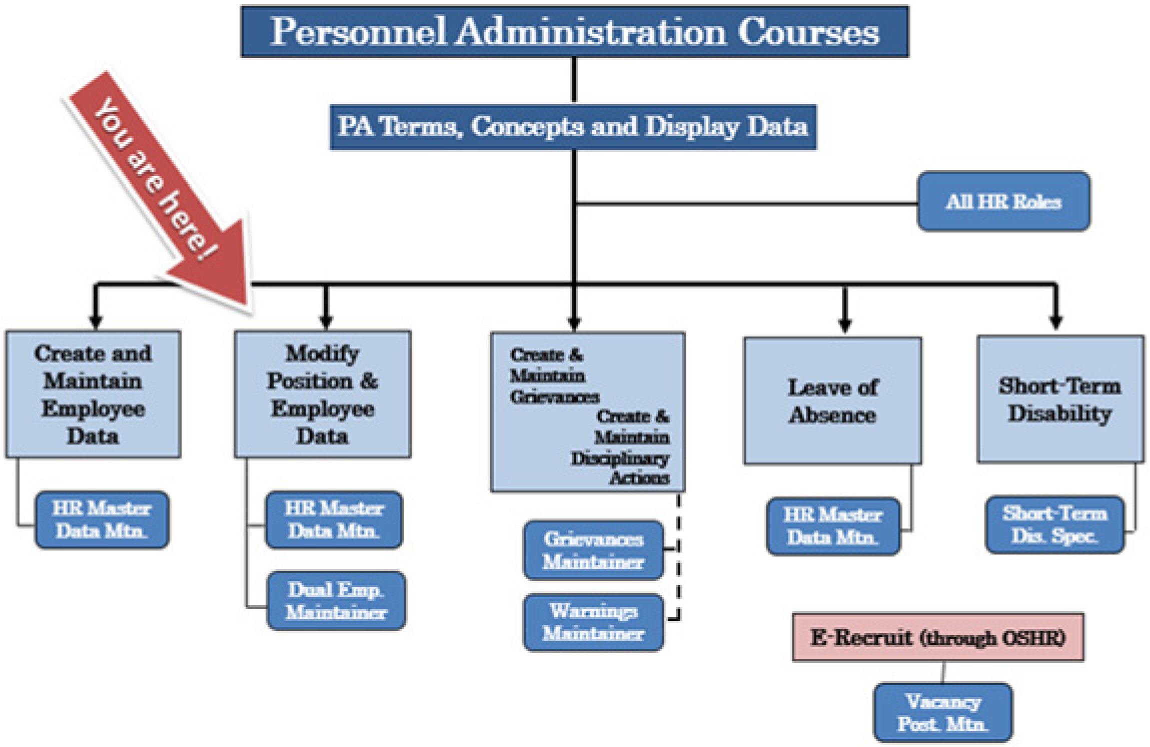
PA310 is a course only offered in a Instructor-led classroom setting.

OSC HR/Payroll Training Curriculum



The OSC HR/Payroll training program comprises several courses and different modules. Based on your HR role, you will attend courses in the *Personnel Administration* module.

PA Curriculum by Security Role



Within the Personnel Administration module, there are several courses. Your position/security roles determine which courses you may be required to attend.

Strategy for Training

Tell Me (Concepts)

- Instructor will discuss the process, responsibilities, and describe the transactions – LISTEN

Show Me (Demonstrations)

- Instructor will demonstrate job-related tasks performed in the OSC HR/Payroll system – HANDS OFF.

Let Me (Exercises)

- Student will complete the exercises which allows for hands-on practice in class – HANDS ON

Support Me (Availability)

- Instructor will be available to answer questions while the students complete the exercises

Course Map

You can see the Course Map of the class at the beginning of each lesson. The bolded and larger text indicates which lesson you are beginning.

The lessons covered in this class include:

- Lesson 1: Modifying Position Settings
- Lesson 2: Modifying Employee Data
- Lesson 3: HR Reports Overview
- Lesson 4: Course Overview

The *Maintain Position/Employee Data and Reporting* Student Guide can be used as a reference when you return to the workplace. For example, you can use the exercises for practicing in the HR/Payroll system training environment.

Course Objectives

Upon completion of this course, you should be able to:

- View position transaction code and infotypes
- Modify existing position and employee data
- Identify the options to access reports

Reference Materials

- Student Guide
- Quick Reference Guides
  - PA Quick Reference Guide
  - HR/Payroll Basics Quick Reference Guide
- Business Process Procedures (BPPs)
  - Work instructions
- Job Aids

SUMMARY

This course is intended to give HR professionals an understanding of the HR/Payroll system Personnel Administration module. This course will provide you with demonstration and practice for modifying position and employee data.

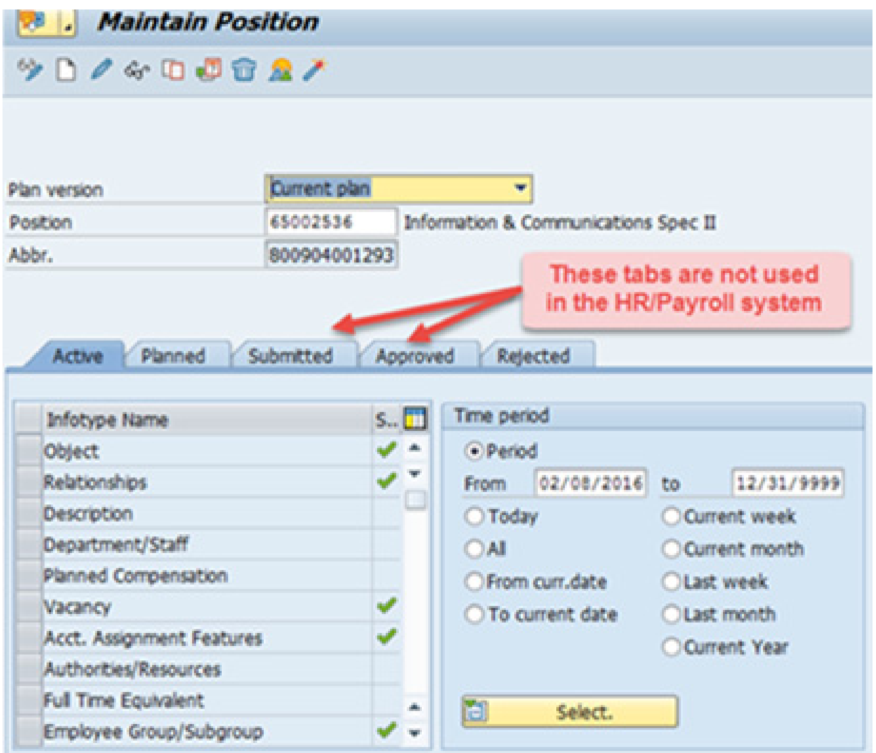
Modifying Position Settings

Lesson Objectives

Upon completion of this lesson, you should be able to:

- Identify the transaction code used to modify a position setting
- Identify and modify position infotypes
- Explain when to notify BEST Shared Services regarding changes in settings

Maintain a Position: PO13



- PO13 is the transaction code used to revise a position setting.
- PO13 is an OM role that some (but not all) Master Data Maintainers may be granted. For training purposed, assume that you do have this role.

HR personnel that have access to PO13 are responsible for updating the above infotypes on a position. The employee may enter hours correctly and the hours may have been approved by the manager, but unless the position infotype is flagged correctly, the employee will not receive the correct pay.

Using leave accrued while out on leave

If an employee wants to use the time that was accrued while he or she was out on paid leave, you will have to create a new PA30 IT2001 in order to enter the new leave time. For example: An employee has 160 hours of approved leave. When the employee goes out on LOA, he/she wants to use the 160, plus the hours that are accruing while on leave. In this case, you would enter the 160 hours on IT2001 during the Action. After the employee has accrued the additional hours, you would create a PA30 for another IT2001 to exhaust the additional leave.

Position Infotypes - Employees and Time

Position flags set on specific infotypes also affect employee time and pay. See the following list of Infotypes that affect employee time and pay:

Position Infotype Flags	
Overtime Compensation	IT9005
Holiday Payout Period	IT9006
Night Shift Premium	IT9007
Evening Shift Premium	IT9008
Weekend Shift Premium	IT9009
Holiday Premium Rate	IT9010
On-Call	IT9011
Callback	IT9012
Weekend Nurse	IT9014
Extended Duty	IT9016
Gap Hours	IT9017

🗁 **NOTE**: If an infotype begins with **9**, it is a customized position infotype.

HR personnel that have access to **PO13D** screen to display the above infotypes on a position. If the position infotypes for the various types of pay are not flagged correctly, the employee will not receive the correct pay. The PO13D screen can be used as a tool to verify an employee's position settings if there is an issue with the employee's Shift Premium pay, Holiday Premium pay, etc.

With approval by the manager, the Classification Section can make the changes on the employee's record.

🗁 **NOTE**: It is important to understand that when a **position** setting is revised that is retro to a pay period prior to the current pay period, **BEST Payroll MUST be contacted** to let them know to run time eval on the affected employees retro to that same time period. BEST Payroll only needs to be contacted if a position is revised. If only time is revised on an employee, OSC HR/Payroll will automatically retro the time eval run.

🗁 **NOTE:** Premium rates populate only on the first of the month. So, unless a change is made on the first of the month, a Retro Evaluation will pick it up the following month.
Example:

- ❖ Today is **August 1**
- ❖ Change is made effective **July 8**
- ❖ Retro Evaluation will pick change up beginning **August 1** unless request is made to BEST to run a Retro Evaluation beginning July 8.

Overtime Compensation (IT9005)

If time worked beyond the overtime limit (40 hours, etc.) is to be paid or accumulated as compensatory time, the position must have a valid IT9005 record. If overtime compensatory time is to be paid out (FLSA Subject only) or expired (FLSA Not-subject only) at a point earlier than 12 months from when it was earned, the Comp Aging Limit field should be populated with the corresponding number of days (30 days, 60 days, etc.). If it is to be paid out immediately, the Immediate Payout checkbox should be checked. The default is 365 days. The setting on IT9005 in conjunction with IT2012 (discussed later) determines the rules around the overtime compensation.

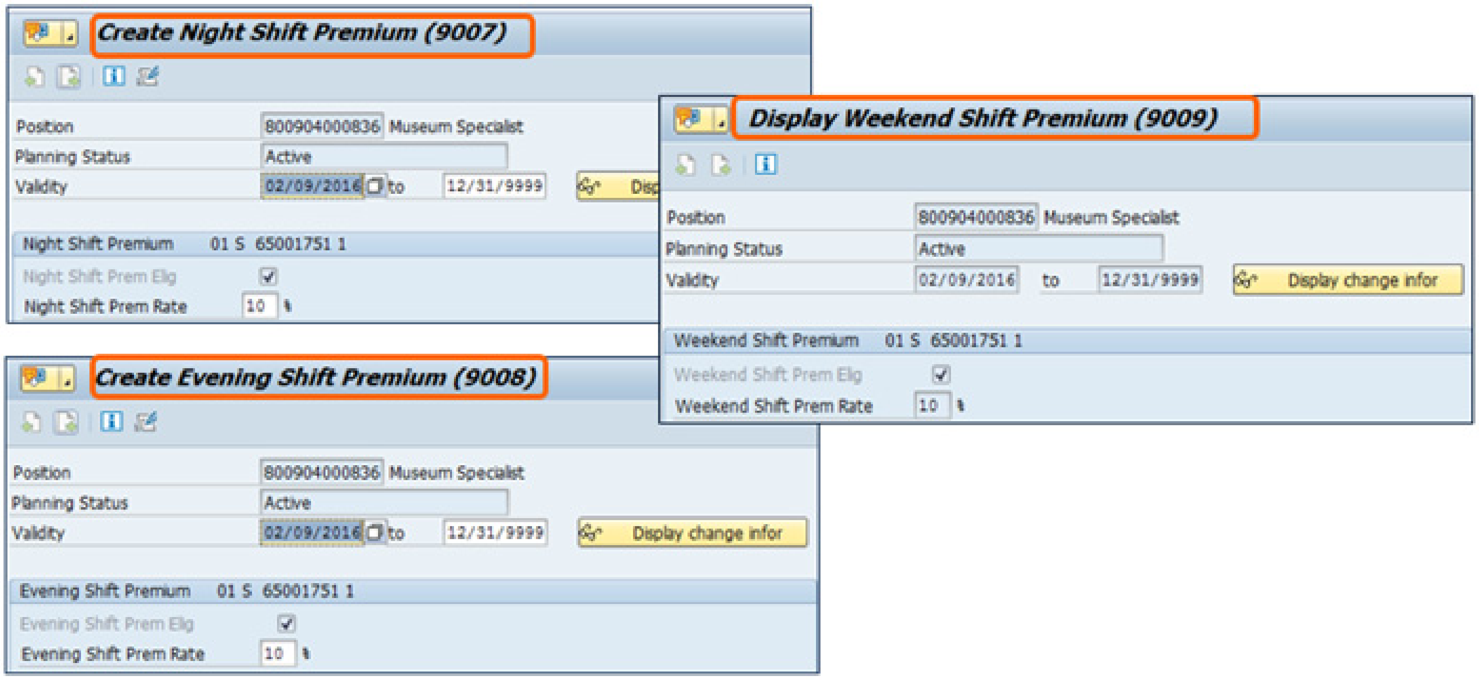
As indicated previously, an employee may have worked over 40 hours and entered the hours on the time sheet and they may have been approved by the manager. But unless the position Overtime Compensation infotype is flagged correctly, the employee will not receive overtime compensation. An IT9005 record is not required if the position is not eligible for overtime pay or compensation.

Create Holiday Payout Period (IT9006)

If holiday compensatory time (equal time off for time worked on a holiday) is to be paid out at a point earlier than 12 months from when it was earned, the Comp Aging Limit field should be populated with the corresponding number of days (30 days, 60 days, etc.). If it is to be paid out immediately, the Immediate Payout checkbox should be checked.

The default is 365 days. If no record exists, the default value of 365 applies.

Shift Premiums (IT9007, IT9008, IT9009)



Positions eligible for any of the premiums listed below must have valid infotypes.

Night Shift Premium (IT9007)

OSHR approved rates other than the default of 10% must be entered in the rate field.

Evening Shift Premium (IT9008)

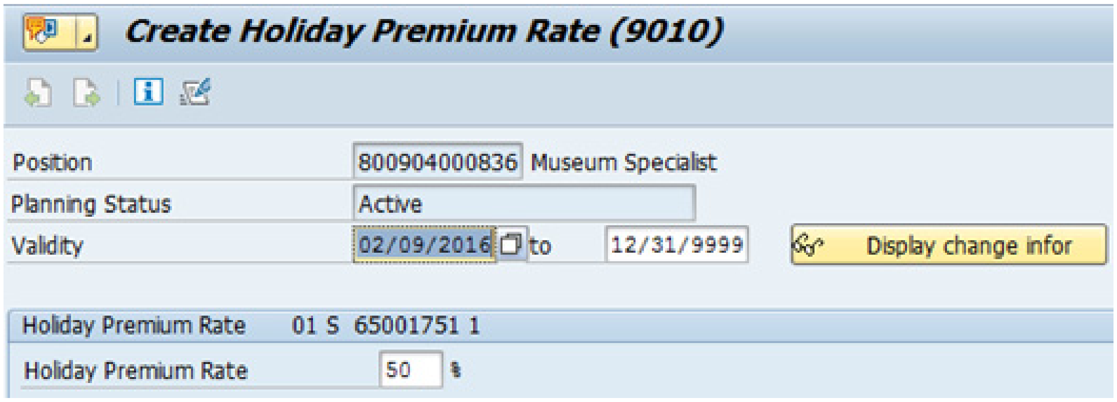
OSHR approved rates other than the default of 10% must be entered in the rate field.

Weekend Shift Premium (IT9009)

OSHR approved rates other than the default of 10% must be entered in the rate field.

The various types of premium pay display as separate line items on the employee's pay stub only if the rates are different. For example, if an employee's evening and night shift are both 10%, the hours worked in the evening and night are added together on one "Shift Premium" line item on the pay stub with the rate of 10%. On the other hand, if the evening rate is 10% and the night is 15%, two separate line items will show with the hours entered for the evening separate from the hours entered for night.

Holiday Premium Rate (IT9010)



Positions eligible for a Holiday Premium Rate must have a valid and current IT9010.

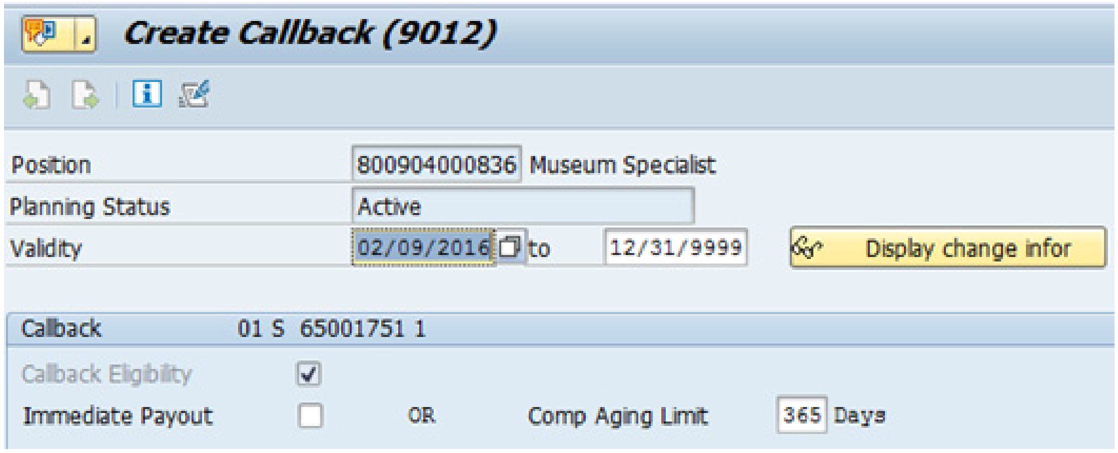
IT9010 is only required if the Holiday Premium Rate is different than 50%. OSHR approved rates other than the default of 50% must be entered in the rate field.

On-Call (IT9011)

Positions eligible for On-Call compensation must have a valid IT9011 record.

The accrued box should be checked if the time is to be collected as On-Call comp time. The rate field must be populated with the OSHR approved on-call rate.

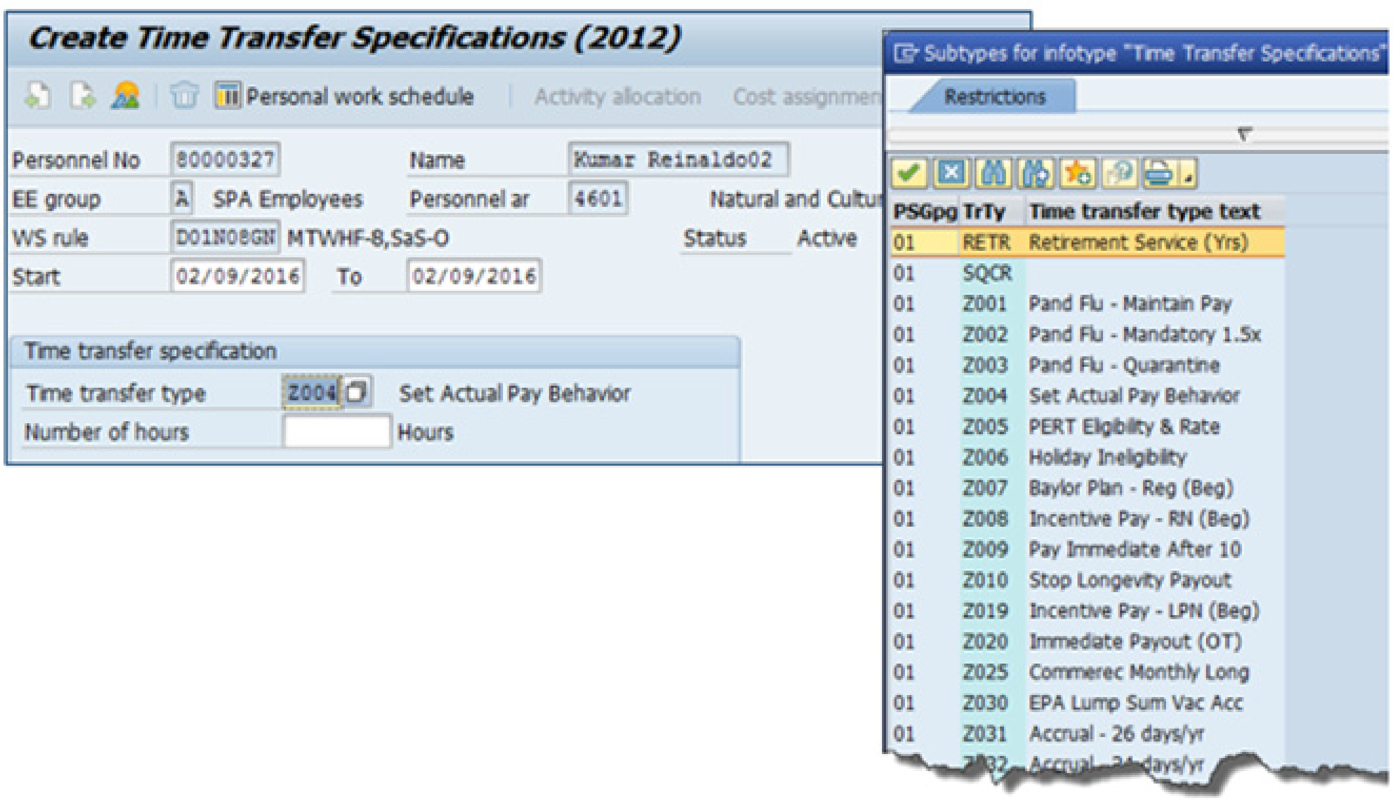
Call Back (IT9012)



Positions eligible for Callback compensation must have a valid IT9012 record. The decision to pay versus comp time is determined by the Callback Accrual checkbox.

Information - The Callback Accrual is currently not working; however the OSC HR/Payroll system Time Production Support section is working to fix it.

Time Transfer Specifications (IT2012)



The "Time Transfer Specifications" infotype (2012) can be used to influence time management behavior and can be applied to an employee by an HR Master Data Maintainer, Leave Administrator, or BEST representative. IT2012 records are created for specific employees for specific periods of time. As the HR Master Data Maintainer, it may be helpful if you understand the following subtypes for the time IT2012:

- Z009 - First 10 hrs Comp (DOT only)

  Applicable for subject employees who have a position with an Overtime Eligibility (IT9005) record that does not indicate "pay immediately". This subtype record will cause the additional hours worked beyond 50 in a week to be "paid immediately". The first 10 hours of additional time worked will be compensated with Compensatory Time at the appropriate rate.

- Z010 - Stop Longevity Payout

  Stops the processing of a partial longevity payment automatically triggered by Time Evaluation. The infotype is created in the background during a Suspension action (Action Z6) and during a Separation with reason BEACON to Non-BEACON Agency (Action ZG, reason 25).

- Z033 -% Longevity Paid

  When a Reinstatement (or Non-BEACON to BEACON) Action is processed for an individual who is eligible for Longevity, and was paid out for some of the months upon previous separation, this subtype is used to key the percentage of annual longevity that the EE has already been paid. This percentage is then deducted when BEACON triggers the first annual payment, ensuring the EE receives only the percentage of the year earned for the time period that the EE was employed with a BEACON agency.

- ZAWA or ZAWL

  Adverse Weather liability hours that have not been made up within 90 days will result in an error message in Time Evaluation. An employee may elect to have overdue Adverse Weather hours recovered from Approved Leave or Leave w/out Pay. The Leave Administrator is responsible for creating the entries.

- ZLOSI / ZLOSD

  Length of service increase or decrease. This subtype record allows adjustments to be made to an employee's Length of Service value in addition to the IT0552's. BEST OM/PA are responsible for creating the entries.

NOTE: Be sure to add comments for any IT2012 created or changed as to why the creation or modification was made.

KNOWLEDGE CHECK

Answer	Question
	1. If a position setting needs to be made retroactive, you must: A. Backdate all associated infotypes. B. Leave dates current and SAP will automatically revise the position setting. C. Contact BEST Shared Services so they can manually run a time eval on any affected employees. D. Panic.
	2. The transaction code PO13 is used primarily to: A. Create a position. B. Maintain or modify a position setting. C. Create employee information. D. Give yourself a promotion.
	3. TRUE or FALSE: Some examples of Position Infotypes might be Overtime Compensation, Night Shift Premium or On-Call.

* *

EXERCISE 1.1: Logging into the HR/Payroll System

SCENARIO

You need to log into the HR/Payroll system to be able to perform the exercises for this class.

Instructions

The instructor will assist you in accessing the system. Follow along as your instructor logs into the HR/Payroll system.

Activities include:

- Sign on with the User ID given to you by your instructor
- Change the technical settings display
  — **Extras > Settings > Display technical names**

- Adding the following transactions to your Favorites folder:
  - PO13
  - PO13D
  - PA20
  - PA30
- Adding the following URL to your Favorites folder:

  http://www.osc.nc.gov/training/osctd/help/index.html

* *

EXERCISE 1.2: Revise Position Settings

SCENARIO

You have received verification that the position settings were incorrect on the Information and Communication Specialist II position. Beginning the first day of next week, the position will be eligible for Overtime Compensation and Holiday Payout; both with a 60-day payout.

NOTE: Revising position settings is an OM role that some (not all) Master Data Maintainers may be granted. For training purposes, assume that you do have this role.

Instructions

For additional help, access the Business Process Procedure (BPP) from the Training HELP website http://www.osc.nc.gov/training/osctd/help/.

1. Enter transaction code **PO13** in the Command field and click **Enter** .

2. From the table below, select the Position Number assigned to you by your instructor and enter it into the Position number field.

	POSITION #: *Info and Comm Specialist II*						
A	65002527	F	65002532	K	65002537	P	65002542
B	65002528	G	65002533	L	65002538	Q	65002543
C	65002529	H	65002534	M	65002539	R	65002544
D	65002530	I	65002535	N	65002540	Inst 1	65002545
E	65002531	J	65002536	O	65002541	Inst 2	65002546

3. Press **Enter** .

4. Use the **scroll bar** to locate and select the **Overtime Compensation** infotype.

5. Click the **Create (F5)** button.

6. Enter the correct **date** in the validity field. The end date should be 12/31/9999.

7. Enter **60** in the Comp Aging Limit field.

8. **Enter** and **Save** .

9. Use the same process to make the appropriate revision to the **Holiday Payout** infotype.

10. Use the **Display (F7)** button to review the infotypes.

11. You just discovered that the payout for the Overtime Compensation should have been immediate, not 60 days. Use the Copy function to make the appropriate correction to the infotype.

    NOTE: A message indicates that the old records will be deleted; click OK. Using the Copy function with the same effective date "erases" the old data and you are left with only the current corrected record.

12. Click the **Back (F3)** button until you return to the SAP Easy Access screen.

This exercise is complete.

* *

SUMMARY

In this lesson, you learned to:

- Identify the transaction code used to modify a position setting
- Identify and modify position infotypes
- Explain when to notify BEST Shared Services regarding changes in settings

Modifying Employee Data

Lesson Objectives

Upon completion of this lesson, you should be able to:

- Describe the process to modify (or maintain) employee data
- Identify the transaction code used to update employee data
- Distinguish among the editing functions
- Use the HR/Payroll system to maintain employee data
- Revise a work schedule

In this lesson, you will enter data into specific infotypes, based on the type of information that needs to be created or revised. You will determine and select the specific infotype to be revised and then make the appropriate data entry. Although Workflow is not required for maintaining employee data, you should continue to use the proper documentation that authorizes the revisions you are making, just as you have done in the past.

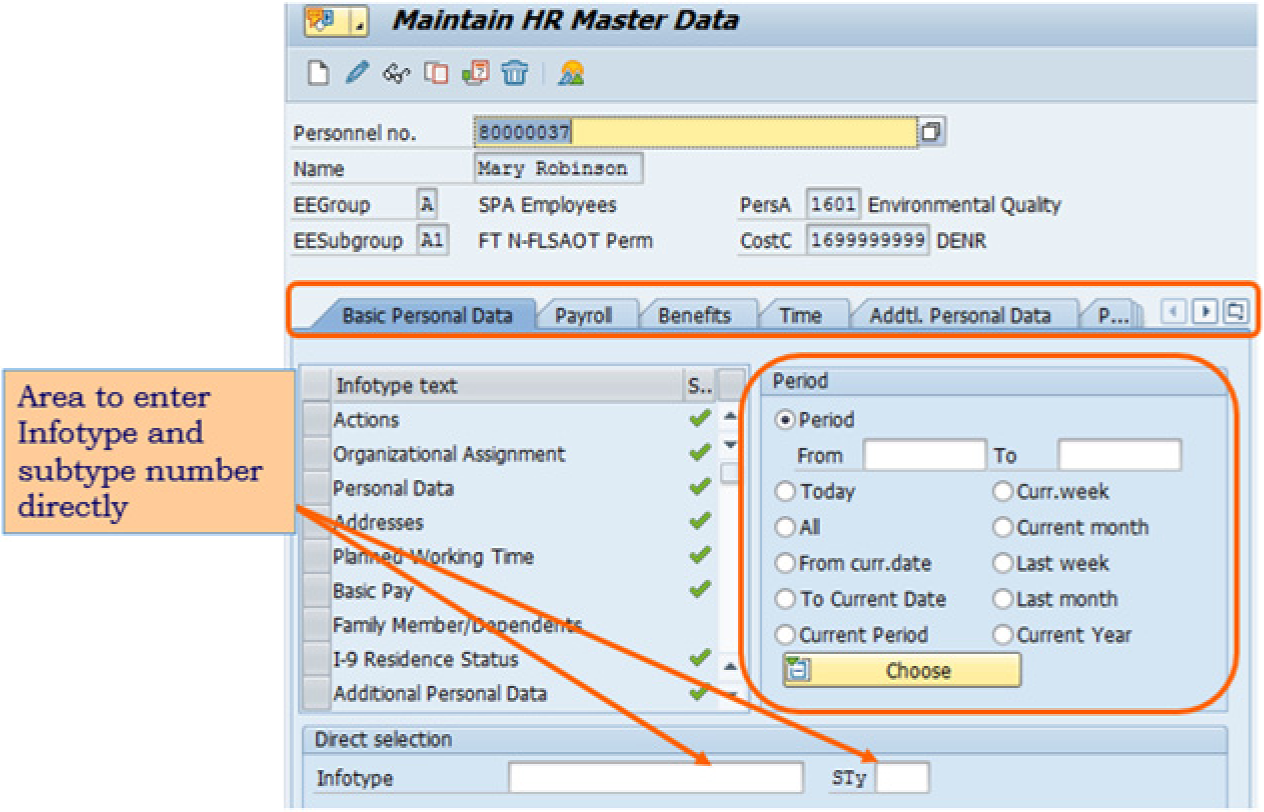
Workflow (the electronic approval process) is not required for maintaining employee data; however, you should continue to use the proper documentation that authorizes the revisions you are making, just as you have done in the past.

If you alter or add an infotype, you need to place appropriate comments on that infotype which should include:

- The date
- Your name
- What you did
- Justification for doing what you did

IMPORTANT! Enter comments as if you were entering them for OSHR.

PA30 - Maintain Master Data



After employees are hired, circumstances may arise that make it necessary to enter new data or revise existing data.

Use **PA30** to access the *Maintain HR Master Data* screen. There are several options available, which are the same options you saw in the **PA20** - *Display Master Data* transaction. The options are:

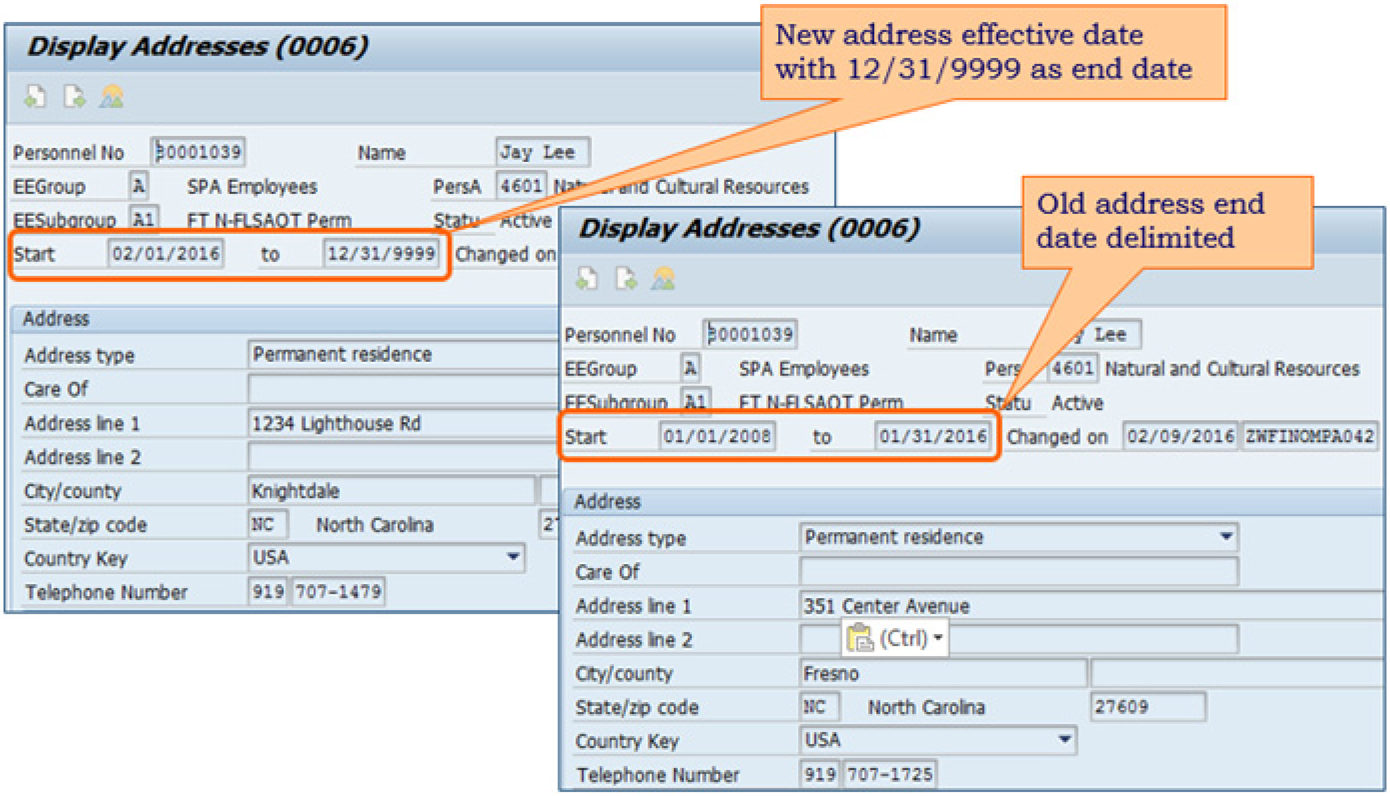
- **Tabs**: The infotypes are grouped together by subject matter on a Tab menu. Simply select the Tab you want to access, or use the display all tabs button. After you select the appropriate tab, you may have to scroll to find the specific infotype.
- **Period**: You have various options regarding the time frame you wish to use when displaying an infotype. Some infotypes will display only if the All option has been selected.
- **Direct Selection**: You can either enter the infotype code and subtype in the Direct Selection field, or use the matchcode to search for the infotype. You don't have to be on a specific tab to use the Direct Selection option.

Infotypes

Infotype Dates

Each entry must have a **start** (beginning/effective) date and an **ending** date. In most cases you will not enter an end date; the OSC HR/Payroll system will automatically apply the end of time for the new data. In addition, the HR/Payroll system automatically delimits the previous infotype to one day prior to the new data.

Infotypes Delimited



The preceding example was for the Actions (New Hire, Promotion) infotype. However, the same concept is true for individual infotypes as well.

In the above example, the employee moved to a new permanent address effective 2/1/2016. When the new permanent address was entered with the 2/1/2016 effective date, the HR/Payroll system automatically assigned the end date as 12/31/9999 and delimited the old permanent address as of 1/31/2016.

The employee's other addresses, emergency contact, and mailing address still have their original end dates of 12/31/9999 because no changes have been made to them. In this case, the Addresses infotype has several subtypes, all with ending dates of 12/31/9999.

NOTE: Emergency addresses must be manually delimited because the HR/Payroll system assumes that an employee can have more than one emergency contact. Therefore, when a new emergency infotype is added, the system does not automatically delimit the former emergency record.

PA Infotypes Online Job Aid

Job Aids: Online you will find a list all Personnel Administration (PA) infotypes and their descriptions. They are located in the Personnel Administration > Job Aids folder on the OSC Training HELP site: http://www.osc.nc.gov/training/osctd/help/

Exercises

In the exercises that follow you will maintain the following infotypes:

- Verify Education
- Monitoring of Tasks
- Objects on Loan
- Bank Details
- Planned Working Time

The *PA Infotypes* job aid is available online. The job aid contains a complete list of all the infotypes used in Personnel Administration, including codes and brief descriptions.

In this class, you will have an opportunity to maintain several infotypes. After you learn to maintain one infotype, you will realize that generally you use the same process and methodology to maintain any infotype.

Discuss with the Instructor any questions you have about infotypes and their descriptions.

Additional Resource
You can find several additional support materials about PA Infotypes on the OSC Training HELP website: http://www.osc.nc.gov/training/osctd/help/index.html Follow this path to access the latest version of the support materials listed below: *Personnel Administration > Job Aids* • New Hire Action Guide • PA Actions Reasons Definitions

Maintain HR Master Data

Maintaining HR Master Data records involves processing existing HR master data records using one of the following functions:

- Creating new data
- Changing existing data
- Delimiting existing data
- Deleting data (only used by HR!)
- Copying data (to maintain history)

Using **PA30 – Maintain Master Data**, allows you to use the various functions to create, copy, change, and delete information, or enter a stop date on a specific infotype.

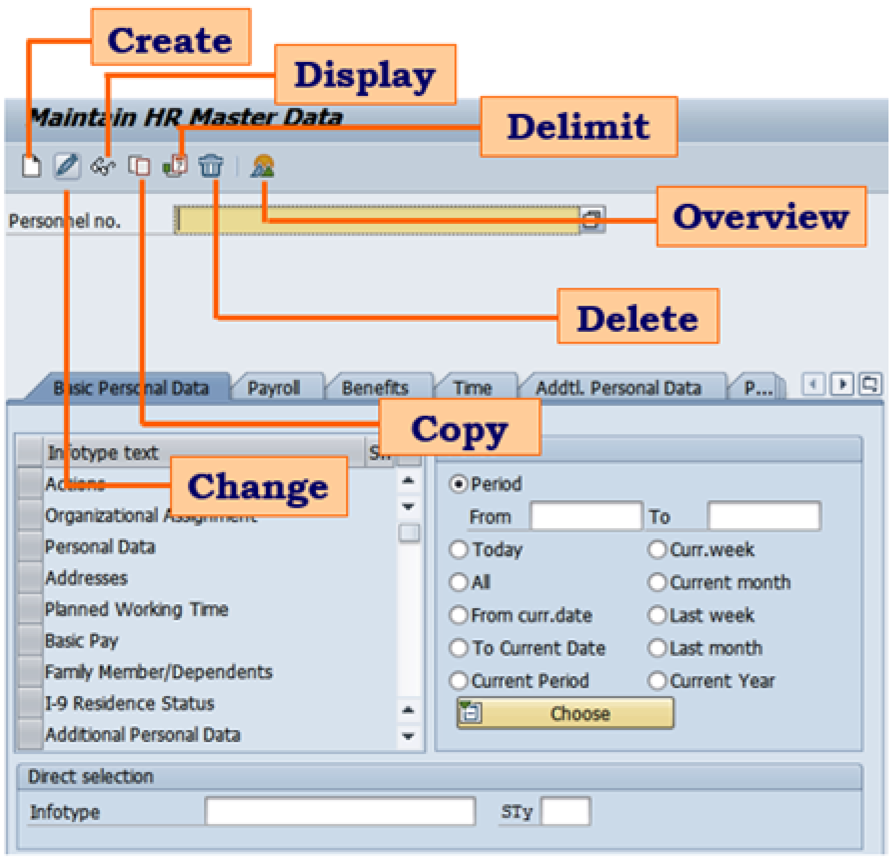
Screens and tasks to which you have access are determined by your OSC HR/Payroll system security role/s. Only certain business roles will have the security access to maintain master data records for the employees in your agency.

Some personnel information can be changed by the employee through Employee Self-Service (ESS), including:

- Tax Withholding
- Addresses
- Bank Information

However, in order to provide you an opportunity to practice, the exercises in this training are designed to assume the employees do not have access to ESS.

Description of Buttons (Icons)



There are several ways to Maintain Master Data as listed below.

- **Create**: Create a new infotype for an existing employee.

- **Change**: **Do not use!** A decision has been made that the best business practice is to use the Copy function with the original date to overwrite existing data and correct data. You will not use the Pencil icon. You can only correct a current (not historical) record. Only BEST Shared Services can make changes to historical records.

- **Delete**: **Do not use!** Only BEST can perform this with OSHR approval. Eliminate a record. This function should be used with caution, because it permanently removes the information from the database, and cannot be retrieved.

Best Business Practice: Have BEST Shared Services make these changes.

- **Delimit**: Enter an end date on an infotype to make it inactive.

- **Copy**: Modify or update an infotype to ensure that history is maintained (as long as you change the effective date accordingly). If you do not use a new effective date, you are overwriting history on some infotypes.

  NOTE: Ensure that you use the new effective date when you use this function.

- **Display**: View an individual infotype.

- **Overview**: View a list or summary of the infotype's data.

Copy Dates are Critical

There is an important distinction between using the Copy function with the original date and with a new effective date:

- Use the **original date** when you need to correct an error on existing infotypes. By using the infotype's original date, you are overwriting the history. Be aware that you can only use the Copy function to correct errors on some infotypes. For others, you will have to contact BEST.
- Use a **new effective date** when you want to create history.

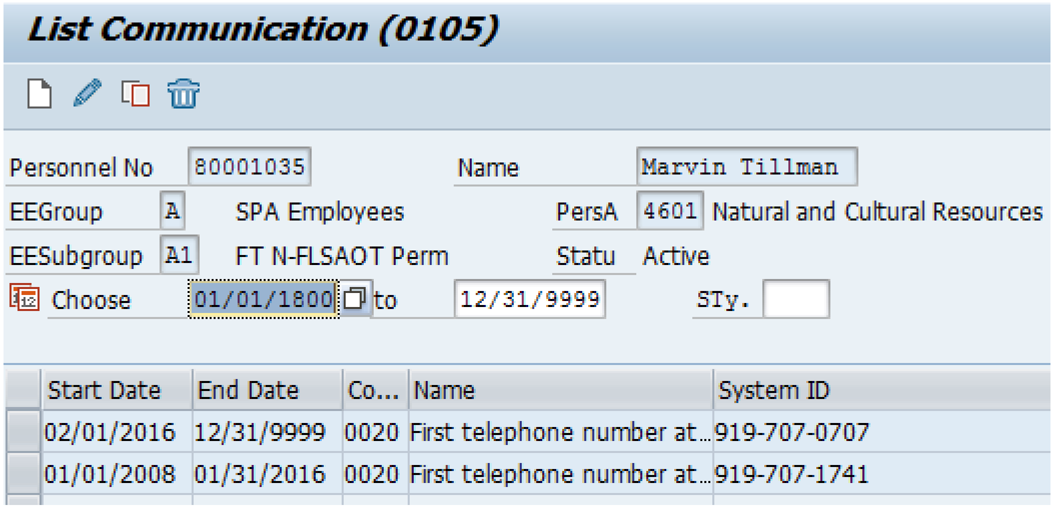
The original date is used to correct data errors. Using this function overwrites the existing data; therefore, there is no history of the former erroneous data. For example, if an employee's address was entered incorrectly (such as numbers transposed), you would not want the incorrect address on the employee's record. Using Copy function with the original date in this instance is appropriate so the correct address is displayed in the employee's record.

You must be extremely careful about the date when using the Copy function. For example, an employee has bank "A", and wants to change to bank "B" the first of next month. If you use the Copy function with the new date (the first of next month), there is a history of both banks. On the other hand, if you used Copy and forgot to put in the new date, it would look as if the employee had always used bank "B"; there would be no history of bank "A". Remember, when using Copy with the original date, there is no history.

NOTE: You can only Copy <u>current</u> records. Keep in mind all history changes must be sent to BEST Shared Services to be changed.

Change Versus Copy Function

(History versus no history)



Example: Communications - IT0105

Let's take the example of an employee who changed work phone numbers and needs to change to his new desk phone number. If you use the Copy command with a new effective date to change his phone number, the OSC HR/Payroll system creates a new record with a different start date. (Remember, the OSC HR/Payroll system is date driven!) This way, the history of the employee's phone number will show ***both*** numbers and the validity periods applicable to each. In the above example the employee's phone number was changed on 2/1/16 to reflect his new work phone number.

If you use the Copy function and do not change the effective date, your new entry overwrites the previous history. Now only the new phone number is in the record and there is no history of what his previous phone number was. It displays as if his phone number has always been 919-707-0707.

🗁 NOTE: Agencies cannot change the following master data changes on IT0002-Personal Data:

- Name
- Date of Birth
- Social Security

These changes must be completed by BEST Shared Services OM/PA team. You will need to include a copy of the Social Security card and Driver's License with your change request.

🗁 NOTE:

— Changes in PO13 may be completed at anytime with any effective date. Changes in PA30 may be completed with an effective date that is NOT beyond the Time "wall."

— Only BEST Shared Services can make changes "behind the wall" or lower the wall for a short period of time for the agency to make changes.

— Note that the wall lowering request must be routed through the agency's designated requester.

Corrections for Specific Errors

- Wrong Employee Group/Subgroup was processed
  - Contact BEST HR
- Wrong Hire Date or Separation Date was processed
  - Contact BEST HR

Infotype Comments/Notes

Comments or notes should be included on all changes to any infotype. Comments and/or notes should, at a minimum, include:

- Date of note
- Your name
- What data changed
- Why the data was changed
- Any necessary approval documentation
- Any other information required by your agency

To enter a comment/note:

- Go to the infotype menu bar and access **Edit > Maintain text** to access the Comment entry box.
- Enter your comment.
- **Save** the data.

Your comment/note is now attached to the Infotype record.

🗁 **OPTION:** You can also access the Comment entry box by pressing the **F9** key on most computer keyboards.

🗁 **BEST BUSINESS PRACTICE:** Write notes as if you were writing them for OSHR to read!

EXERCISE 2.1: Monitoring of Tasks (IT0019)

SCENARIO

Janet Thomas has indicated that she is an RN (Registered Nurse) on her application. This needs to be verified within 90 days of her hire date.

- Assume her hire date is today.

Monitoring of Tasks (IT0019)

IT0019 is like a tickler file that is date-driven. A report is run to determine which employees have transactions coming due soon. Run BI report B0099 or the Date Monitoring report (S_PH0_48000450) in the OSC HR/Payroll system to view the various tasks due. If the task is completed prior to the due date entered, it will still display on the Date Monitoring report unless you change the end date of the Monitoring of Tasks infotype.

You may need to enter more than one IT0019 for a transaction. For example, if an employee is a new hire, you would enter IT0019 to follow-up on the probationary period, and another one regarding the foster child documentation.

Instructions

For additional help, access the Business Process Procedure (BPP) from the Training HELP website http://www.osc.nc.gov/training/osctd/help/.

1. Enter transaction code **PA30** in the Command field and click **Enter** .
2. From the table below, select the personnel number for Janet Thomas assigned to you by your instructor and enter it into the Personnel number field.

	PERNR #: J*anet Thomas*						
A	80000286	F	80000291	K	80000296	P	80000301
B	80000287	G	80000292	L	80000297	Q	80000302
C	80000288	H	80000293	M	80000298	R	80000303
D	80000289	I	80000294	N	80000299	Inst 1	80000304
E	80000290	J	80000295	O	80000300	Inst 2	80000305

3. Press **Enter** .
4. Select the **infotype** (0019) and applicable **subtype** (05 Credential Verificat).
5. Select the **Create** button.
6. Enter the applicable date in the Date of Task field.

7. Press **Enter**. Observe that the Reminder Date field automatically populated. You can accept this date or delete and enter a date.

8. Select **Edit > Maintain text** from the menu.

   NOTE: You can use this option to write notes on many infotypes.

9. Enter the date, your name and type the following note:

   Need to verify RN credentials for Janet Thomas.

   NOTE: Always begin each note with the date and your name. In your work environment, your note would include whatever information is required by your agency.

10. Click **Save** to save the note. Observe that the infotype now has an icon indicating a note exists.

11. Click **Save** again to save the infotype.

12. Click the **Back (F3)** button until you return to the SAP Easy Access screen.

This exercise is complete.

* *

EXERCISE 2.2: Maintain Master Data - Education (IT0022)

SCENARIO

Today you reviewed your Monitoring of Tasks report and found that Jimmy Chonez has a pending verification due for his Bachelor's degree from Duke.

Create a new record on IT0022 (Education) that indicates you have received verification of Jimmy's degree. You will use the COPY function.

Instructions

For additional help, access the Business Process Procedure (BPP) from the Training HELP website http://www.osc.nc.gov/training/osctd/help/.

1. Enter transaction code **PA30** in the Command field and click **Enter** .

2. From the table below, select the personnel number for Jimmy Chonez assigned to you by your instructor and enter it into the Personnel number field.

	PERNR #: J*immy Chonez*						
A	10000011	F	10000016	K	10000021	P	10000026
B	10000012	G	10000017	L	10000022	Q	10000027
C	10000013	H	10000018	M	10000023	R	10000028
D	10000014	I	10000019	N	10000024	Inst 1	10000029
E	10000015	J	10000020	O	10000025	Inst 2	10000030

3. Press **Enter** .

4. Select the **infotype** (0022) and applicable **subtype** (06 Bach deg).

5. Press **Enter** .

6. Select the **Copy** button.

7. Enter the correct **date** (today) in the Start field.

8. Enter **12/31/9999** in the To field.

   NOTE: When verifying education, you are entering the date you received the verification as the Start date and the end of time as the To date. You are not entering the dates the employee indicated he or she attended school. See the *Enter Verified Education* Job Aid on OSC Training HELP website in the Personnel Administration > Job Aids folder for details.

9. Change the **Verified** field to indicate that it is no longer pending.

10. **Enter** and **Save** .

11. Click the **Back (F3)** button until you return to the SAP Easy Access screen.

This exercise is complete.

EXERCISE 2.3: Maintain Employee Data - Delimiting Infotypes

SCENARIO

Marsha Sanders has been notified that the position she currently holds no longer requires that she have a pager and a cell phone. She turned in both of the items today.

- Before you begin the exercise, use the Overview function to view all of the items she has on loan. Observe that they all have an end date of 12/31/9999.
- Delimit the items on the Objects on Loan infotype using the applicable subtype.
- After you complete the exercise, view the list again. Observe that the pager and cell phone now have a delimited end date.

Instructions

For additional help, access the Business Process Procedure (BPP) from the Training HELP website http://www.osc.nc.gov/training/osctd/help/.

1. On the Easy Access screen, enter transaction code **PA30** in the Command field and click ✓.
2. From the table below, select the personnel number for Marsha Sanders as assigned your instructor and enter it into the Personnel number field.

	PERSONNEL #: M*arsha Sanders*						
A	80001163	F	80001168	K	80001173	P	80001178
B	80001164	G	80001169	L	80001174	Q	80001179
C	80001165	H	80001170	M	80001175	R	80001180
D	80001166	I	80001171	N	80001176	Inst 1	80001181
E	80001167	J	80001172	O	80001177	Inst 2	80001182

3. Enter **Objects on Loan (0040)** in the Direct Selection/Infotype field.
4. Click the **Enter** ✓ button to ensure that you have selected the correct item.
5. Click the **Delimit (Shift+F1)** button. A pop-up window is displayed (in some cases) requesting that you enter the delimit date.
6. In the Delimit Date field, enter the **date** the item is to be delimited and click the **check mark**.

You can also enter the delimit date down from the Choose field on the Delimit Objects on Loan screen.

> **CAUTION!!** Keep in mind that the system delimits a transaction one day prior; therefore, if the employee turned in the item today, you would enter the date as of today. When the system delimits the date, it shows that the employee was responsible for the item up through yesterday.

7. Click the **green check mark** on the pop-up information box to continue.
8. On the Delimit Objects on Loan screen, select the **line item**.
9. Click the **Delimit (Shift+F1)** button.
10. Click the **Overview (Shift+F8)** button to review the Objects on Loan with the applicable subtype to verify that the item is delimited on the appropriate date.
11. Click the **Back (F3)** button.

This exercise is complete.

* *

EXERCISE 2.4: PA30 - Bank Information (IT0009)

SCENARIO

Rose Brown has informed you that in addition to her current bank she has a new bank to which she wants to direct 25% of her direct deposit into a checking account. In addition, she wants $100 to go to the new bank into a savings account. The remainder will go to the current bank in her checking account. The effective day is the first of next month.

- New bank - Capital
- Bank key - 053112123
- Checking account - 24515487
- Savings account - 1257843

Bank details

The completion of the Bank Details infotype (0009) must be entered in order for payroll to run on the new employee. If the bank details are not available at the time of the data entry, it is your responsibility to obtain that information and enter the infotype before the system is closed for payroll processing. Even if you have instructed the employee to enter the data in ESS, you still must follow up with the employee to ensure he or she makes the entry prior to payroll closing. When creating, closing or changing accounts, the timing is critical in OSC HR/Payroll.

> **CRITICAL!** If an employee wants to close an account and move to a new account, you should advise the employee to leave the old bank account open until the direct deposit has correctly been made to the new bank or the new account.

Instructions

Access the Business Process Procedure (BPP) from the Training HELP website **http://www.osc.nc.gov/training/osctd/help/**. Follow along with the BPP to complete the exercise.

1. On the Easy Access screen, enter transaction code **PA30** in the Command field and click **Enter**.
2. From the table below, select the personnel number for Rose Brown as assigned your instructor and enter it into the Personnel number field.

	PERSONNEL #: R*ose Brown*						
A	80000165	F	80000170	K	80000175	P	80000180
B	80000166	G	80000171	L	80000176	Q	80000181
C	80000167	H	80000172	M	80000177	R	80000182
D	80000168	I	80000173	N	80000178	Inst 1	80000183
E	80000169	J	80000174	O	80000179	Inst 2	80000184

3. Click **Enter**.
4. Select the **Bank Details** infotype and applicable subtype for **other bank**.
5. Click the **Create (F5)** button.
6. Enter the **first day of the next month** as the <u>Start</u> (effective) date.
7. Enter **053112123** in the bank key (routing number) field.
8. Enter **24515487** in the checking account number field.
9. Enter **01** in the Bank Control key field to signify that this deposit should be in a <u>checking</u> account.
10. Enter **25** in Standard Percentage field.
11. Click the **Enter** button.
12. Click the **Save (Ctrl+S)** button.
13. Click the **Copy** button. (Observe that you are still on IT0009 / subtype 1 and all of the data has defaulted.)

    NOTE: The date has copied too!

14. Enter the **effective date**. (The defaulted date is the one from the current record. You need to enter a new date for the record you are now creating.)
15. The bank key (**053112123**) remained the same.
16. Enter **1257843** in the Account field.
17. Enter **02** in the Bank Control key field to indicate this is a **savings account**.

18. Enter **100.00** in Standard Value field.

19. Delete **25** from the Standard percentage field.

20. Click the **Enter** button.

21. Click the **Save (Ctrl+S)** button.

22. Click the **Back (F3)** button to return to the SAP Easy Access screen.

This exercise is complete.

* *

EXERCISE 2.5: Maintain Employee Data - Planned Working Time (IT0007)

SCENARIO
Effective the first day of next month, Jimmy Chonez has requested and been granted a permanent move from his current shift to a 4-day work week days, 10 hours Tuesday – Friday with Monday, Saturday, Sunday off.

Instructions

Access the Business Process Procedure (BPP) from the Training HELP website **http://www.osc.nc.gov/training/osctd/help/**. Follow along with the BPP to complete the exercise.

Using knowledge that you learned in previous exercises, access the applicable infotype and update Jimmy's files.

HINT: Don't forget to change the Working Week field.

1. From the table below, select the personnel number for Jimmy Chonez as assigned by your instructor.

	PERNR #: J*immy Chonez*							
A	10000011	F	10000016	K	10000021	P	10000026
B	10000012	G	10000017	L	10000022	Q	10000027
C	10000013	H	10000018	M	10000023	R	10000028
D	10000014	I	10000019	N	10000024	Inst 1	10000029
E	10000015	J	10000020	O	10000025	Inst 2	10000030

2. Click **Enter**.

3. Create a new **IT0007**.
4. Enter the new **Start date**.
5. Enter the new **Work schedule rule**.
6. Check to see if the **Working week** needs to be adjusted.
7. **Enter** and **Save.**
8. A message displays to check the **Basic Pay** (IT0008) infotype. Press **Enter** to bypass the message.
9. The **Possible Subsequent Activities** pop-up displays. In this scenario, close the pop-up because this change does not affect enrollment into a new Retirement program. In your work environment, you would close or select as appropriate.
10. Click **Back** to return to the SAP Easy Access screen.

This exercise is complete.

* *

EXERCISE 2.6: Maintain Employee Data - Withholding W4 (IT0210)

SCENARIO

Effective today, Leona Grayson would like to have her federal and state withholding changed from 0 allowances to 1. In addition, she does not want any additional money withheld.

Instructions

Access the Business Process Procedure (BPP) from the Training HELP website **http://www.osc.nc.gov/training/osctd/help/**. Follow along with the BPP to complete the exercise.

Using knowledge that you learned in previous exercises:

1. From the table below, select the personnel number for Leona Grayson as assigned your instructor and enter it into the Personnel number field.

PERNR #: *Leona Grayson*							
A	80000145	F	80000150	K	80000155	P	80000160
B	80000146	G	80000151	L	80000156	Q	80000161
C	80000147	H	80000152	M	80000157	R	80000162
D	80000148	I	80000153	N	80000158	Inst 1	80000163
E	80000149	J	80000154	O	80000159	Inst 2	80000164

2. Select the appropriate infotype and subtype.
3. Make the changes in the appropriate fields.

   Remember to use the Copy function to complete this transaction.

4. Save the changes.
5. Click **Back** to return to the SAP Easy Access screen.

This exercise is complete.

* *

KNOWLEDGE CHECK #2

Answer	Question
	1. When creating, closing or changing bank accounts, the timing is critical in the OSC HR/Payroll system. A. True B. False
	2. If you need to remind yourself to complete a certain task, you would create: A. Objects on Loan IT0040 B. Planned Working Time IT0007 C. Substitutions IT2003 D. Monitoring of Tasks IT0019
	3. A factor that affects an employee's overtime, shift premium and holiday pay are the settings on the employee's personnel record. A. True B. False

SUMMARY

In this lesson, you learned to:

- Describe the process to modify (or maintain) employee data
- Identify the transaction code used to update employee data
- Distinguish among the editing functions
- Use the HR/Payroll system to maintain employee data
- Revise a work schedule

HR Reports Overview

Lesson Objectives

Upon completion of this lesson, you should be able to:

- Identify the two applications that house reports
- Describe how to access reports in both applications
- Describe the available HR reports
- Add additional fields to access an HR/Payroll system report
- Use multiple selections in a specific field
- Execute and view an HR/Payroll HR report

In this lesson, you will enter data into specific infotypes, based on the type of information that needs to be created or revised. You will determine and select the specific infotype to be revised.

Workflow (the electronic approval process) is not required for maintaining employee data; however, you should continue to use the proper documentation that authorizes the revisions you are making, just as you have done in the past.

Where to Find Reports

SAP	BI
Real time data *	Data at a point in time *
Transactional reports	Analytical reports
Performance considerations for large volumes	Aggregation of large data volumes
Data by functional area	Merge disparate data
Current data only	Include history data with current data

Human Resources reports are housed in both OSC HR/Payroll SAP system reports and Business Intelligence (BI). You can see in the comparison above the advantages of each reporting system.

🗁 * Many OSC HR/Payroll system transactions are posted at the time the entry is made. Therefore, when you run an OSC HR/Payroll SAP report, for example for today, the data is current including today's data. Data is loaded into BI daily; therefore when you run a report in BI, for example for today, you are actually viewing yesterday's data.

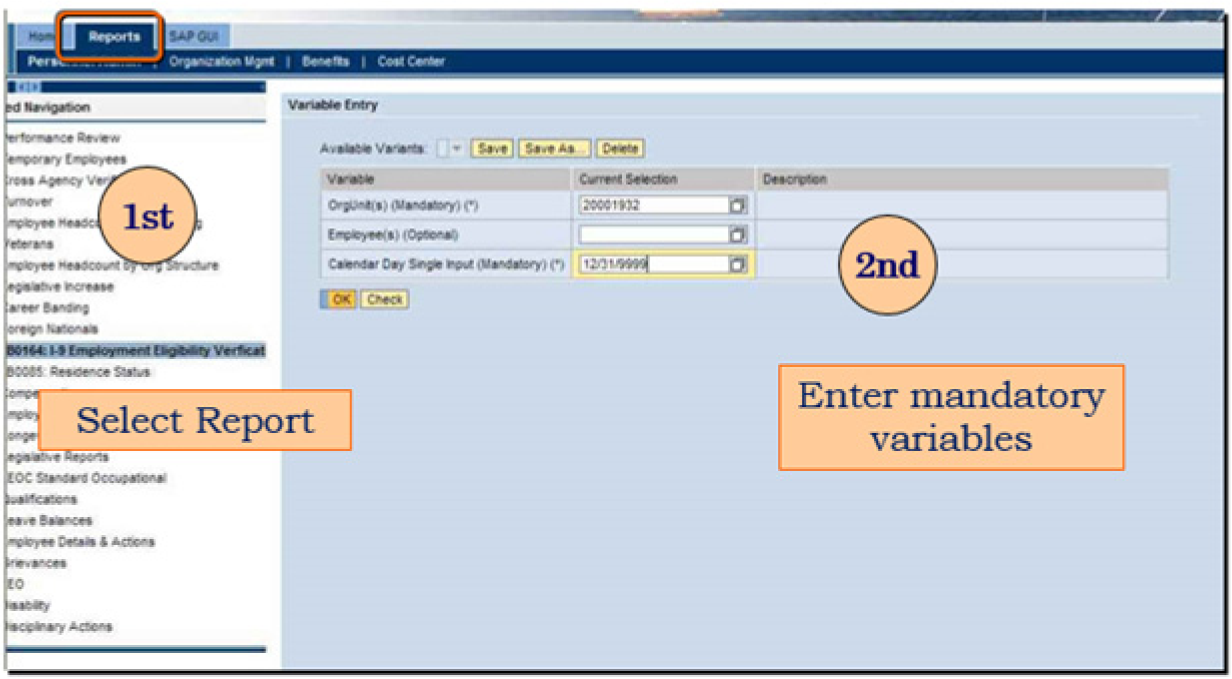
You can see a list of BI reports (and a description) by accessing the applicable job aid on the OSC Training HELP website.

A list of the SAP HR reports is available from the SAP reports menu.

Additional Resource
You can find several additional support materials about SAP ERP reports on the OSC Training HELP website: http://www.osc.nc.gov/training/osctd/help/index.html Follow the following path to access the latest version of the job aids: *ERP Reporting > Job Aids* • ERP Reports

For more information on reports, see the online reporting class.

BI Reports



If you have security access to run BI reports, you will see a Reports tab on your portal.

On the initial screen, you first select the report name in the left panel.

Next, enter the mandatory variables (Org Unit and date).

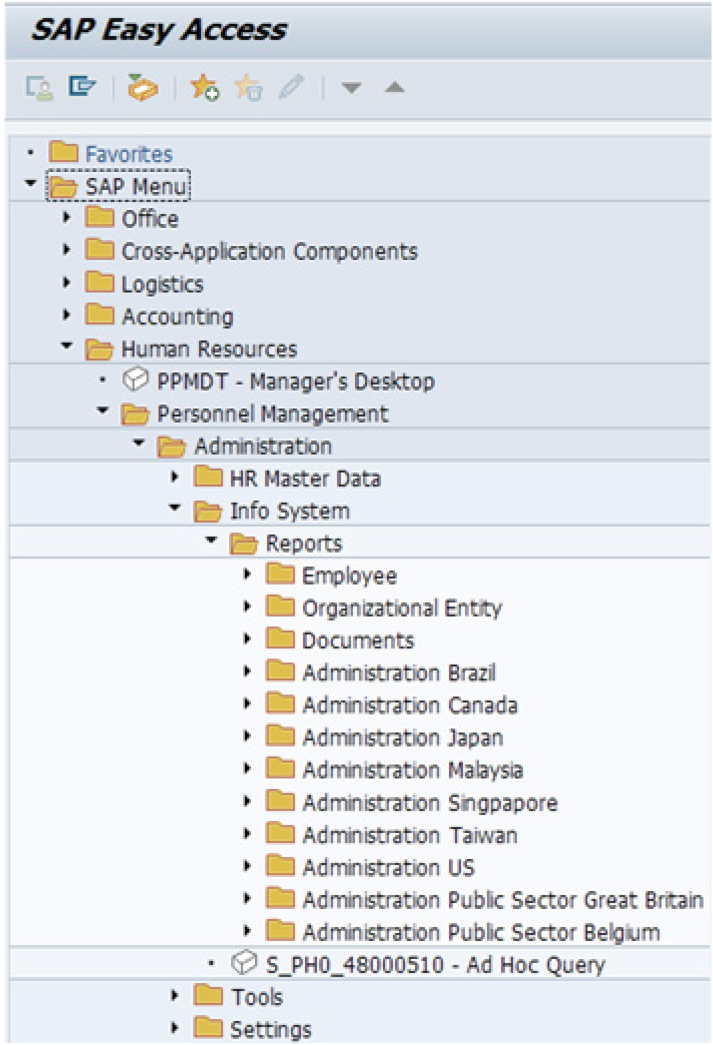
On the next screen, you can literally drag and drop any of the fields from the free characteristics list onto the report. The rows and columns above the free characteristics section automatically default into the report.

You can print the report, write comments, send to someone else, or export to an Excel spreadsheet.

PA & OM Reports in Business Objects (BOBJ)

We also have the new Business Object (BOBJ) reports for PA and OM. They are located in the Business Object report section in BEACON.

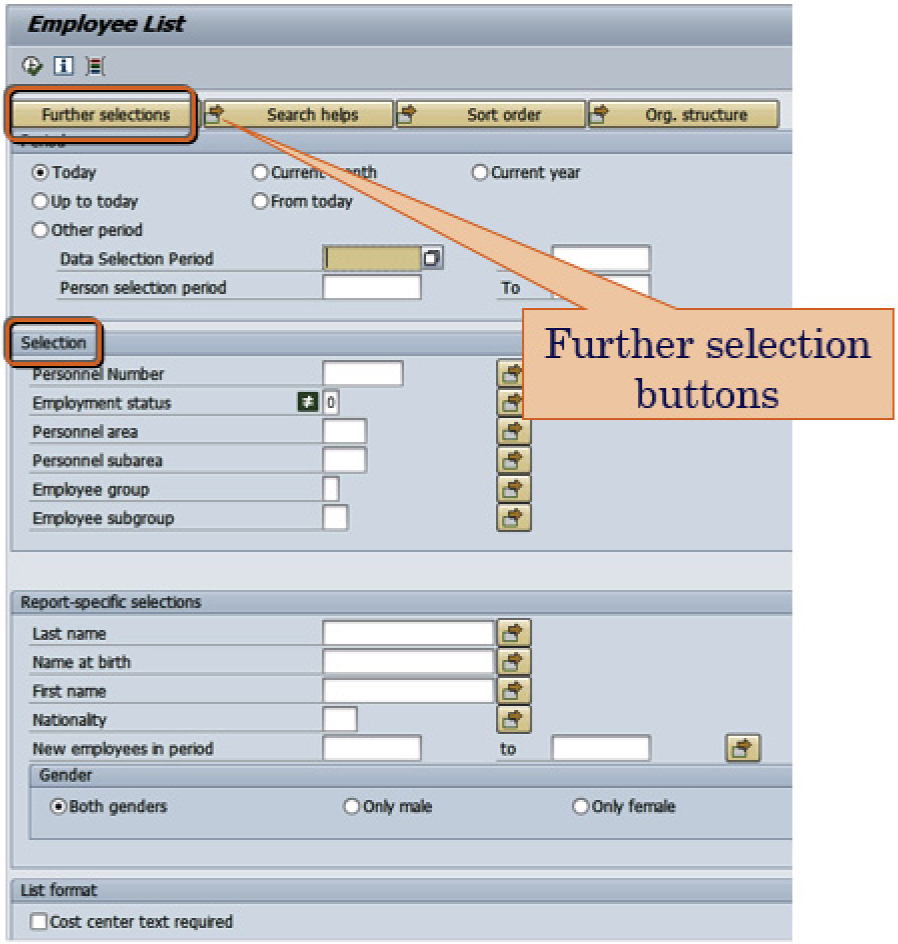
HR/Payroll ERP SAP Reports



The HR/Payroll ERP SAP reports are accessed via the Easy Access screen, or by using the applicable transaction code. The reports are categorized according to Employee, Organizational Management, Documents, Administration compliance and administration garnishments.

Since the report output is determined by your security role, you will only see those employees for which you have been given security access.

Entering Selection Criteria



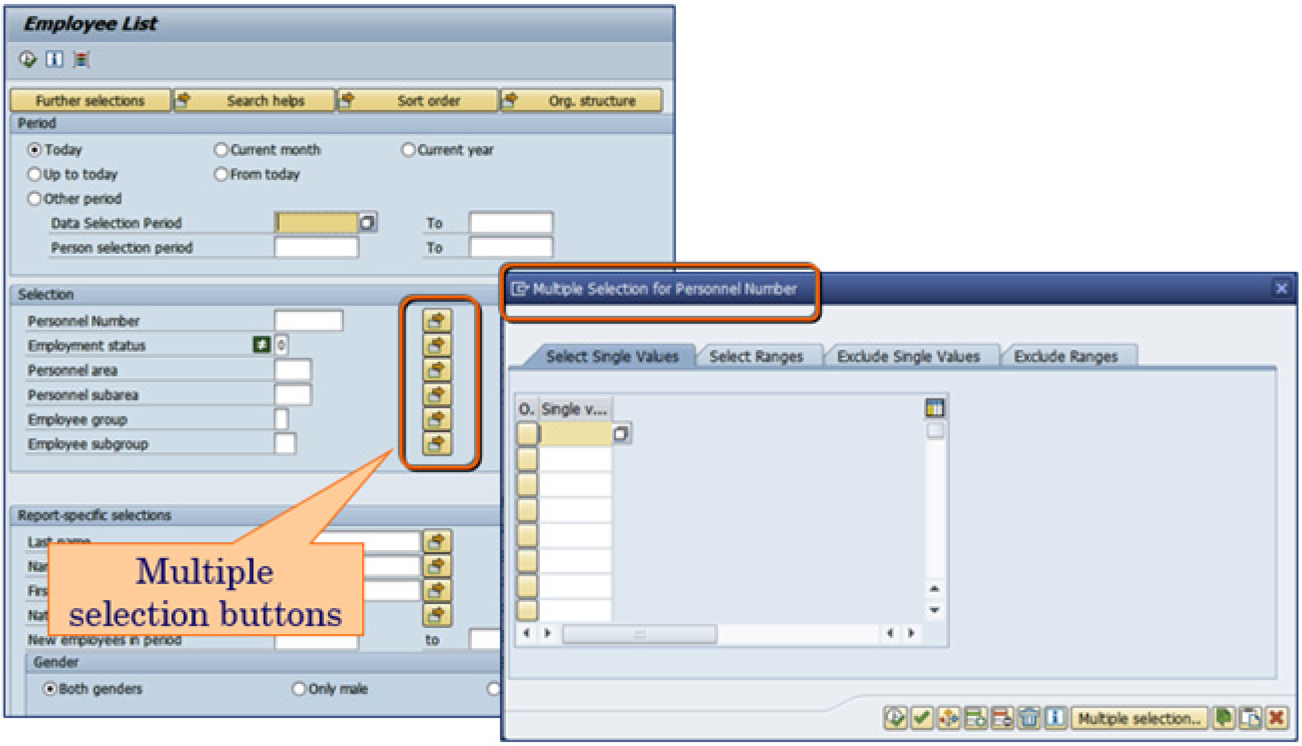
In the HR/Payroll system, the first screen of each report allows you to specify the data you want to view in a report. The type of fields that display on the selection screen differ for each report.

NOTE! You should never run the report without specifying the selection criteria. If you do not specify selection criteria, the HR/Payroll system must search through the entire database for the employees to which you have security access. If several people are running reports at the same time without any selection criteria, the capacity of the HR/Payroll system reporting system is unnecessarily taxed which could result in a slow response.

OSC HR/Payroll system reports have many options and functions. In this class, we only cover a few of them. The selection screen includes:

- Period: Select specific time frames that you want included in the report. To specify a specific date (or range), you must select the *other period* radio button and then enter the dates.
- Selection: In this area, you select the specific criteria you want included on the report, for example, personnel area, employee status, just to name a few.
- Further selections button: Use this function if you want to add, or remove fields to the Selection area. Observe in the illustration that the *Personnel Area* and *Personnel Subarea* fields are not present in the Selection area. You can use the Further selections button to add those fields to the screen.

Using Multiple Selections



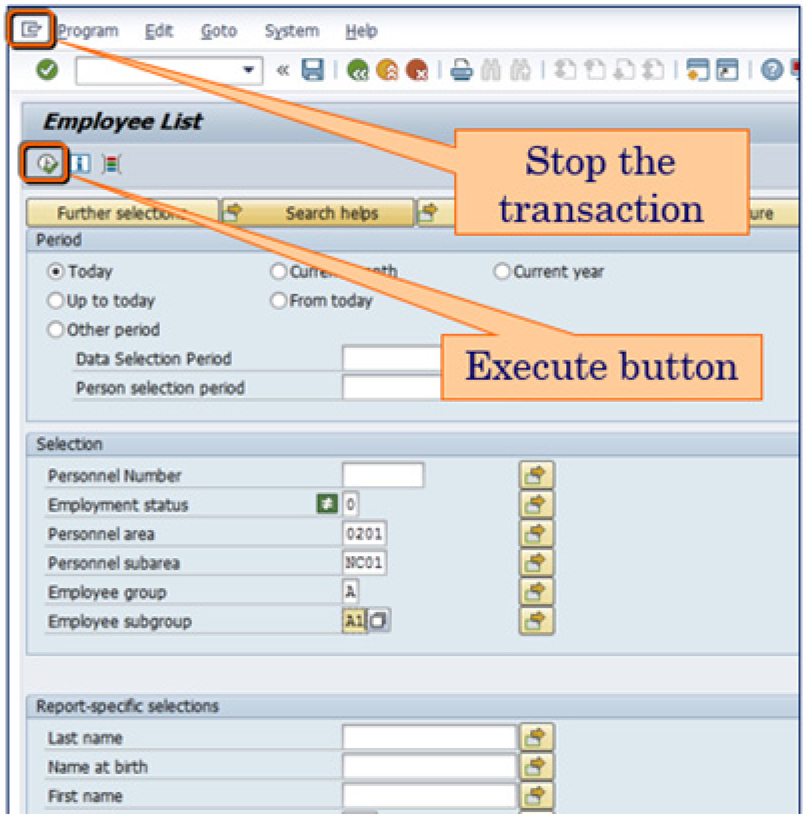
The yellow arrows beside each field are called **multiple selection** buttons. When you click the arrow, a new window is displayed. On that window, you can use the tabs to indicate:

- Additional single criteria
- A range of criteria
- Single criteria to exclude
- A range of criteria to exclude

Observe in the illustration above that the **Selection** button was used to add the Personnel Area and Personnel Subarea fields. They now display on the screen as fields to be used for selection criteria.

Entering the appropriate selection criteria is key to getting accurate report results. For example, if you narrow your selection criteria too small, you may get a message that there are "no values".

Executing a Report



When you have entered all of the selection criteria, click the **Execute** button to run the report.

🗁 **NOTE**: Sometimes when you are running a report, or performing other transactions, the system may appear to be taking an inordinate period of time. You can stop the transaction by clicking the icon at the top left of the screen, and selecting **Stop Transaction** from the menu.

* *

EXERCISE 3.1: Run the Employee List Report

SCENARIO
Use OSC Text paragraph style

Instructions

For this exercise use the menu and select Employee List.

1. From the Easy Access screen, select **SAP menu > Human Resources > Personnel Management > Administration > Infosystem > Reports > Employee > Employee List**

2. Select **today's date.**

3. Look in the Selection area of the screen. You will add or remove fields as needed.

4. Click the **Further Selections** button and do either both or one of the following as necessary:

- If Personnel Area and Personnel Subarea on are not on the screen, select them from the left column, and then add them.
- If Employee Group and Employee Subgroup are on the screen, select them from the right column, and remove them.
- Add the Org Unit.

5. Click the **Continue** button.
6. In the Personnel Area field enter **4601-Natural and Cultural Resources**.
7. In the Personnel Subarea field enter **NC01**.
8. Click the **Execute** button.

Review the results of your data query.

This exercise is complete.

* *

SUMMARY

In this lesson, you learned to:

- Identify the two applications that house reports
- Describe how to access reports in both applications
- Describe the available HR reports
- Add additional fields to access an OSC HR/Payroll system report
- Use multiple selections in a specific field
- Execute and view an OSC HR/Payroll HR report

Course Review

Course Objectives

Upon completion of this course, you learned to:

- View position transaction code and infotypes
- Modify existing position and employee data
- Identify the options to access reports

Next Steps

- Monitor the HR/Payroll System communication
  — BEST Shared Services web site (especially the Updates tab)
  URL: http://www.osc.nc.gov/BEST/index.html
  — BEACON Training website: **What's New** link
  URL: http://www.osc.nc.gov/beacon/training/whats_new.html
- Review conceptual materials
- Access the Training HELP site
  URL: http://www.osc.nc.gov/training/osctd/help
- Practice what you've learned
  URL: http://mybeacon.nc.gov
  — Client 899
  — Use your current NCID user name and password

Continue to monitor updates on the BEACON University website for information regarding any future training that you are scheduled to attend.

Keep your training materials close by as a ready reference.

Want to practice what you have learned from your desk?

🗁 Follow the link provided above to access the training client through the HR/Payroll Portal. The training client is number 899. Your current NCID user name and password are used to access the practice environment.

Need transactional assistance?

Remember to access the Training HELP website when you need assistance in completing transactions. As stated above, the work instructions can be accessed on line through the web link in the steps above.

Course Assessment/Evaluation

Follow the instructions given by your instructor to complete your evaluation of today's class in the Learning Management System (LMS).

CONGRATULATIONS!

You've completed the course!